

agricultural situation

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U.S. DEPARTMENT OF AGRICULTURE • STATISTICAL REPORTING SERVICE



CATTLE CALCULUS

Cattle feeders had 89 percent more animals 1,100 pounds and over in feedlots this past January-March than the year before—many not because they wanted to but simply because they hoped to ease their loss position by holding out for a stronger market.

Raising and selling cattle for profit takes skill—not just in production techniques but in timing marketings so as to get the best possible price.

Two SRS reports, *Cattle on Feed* and *Livestock Slaughter*, are must reading for any cattle producer who wants to take advantage of the market, rather than let the market take advantage of him.

In this article, based on interviews with Wilbert Walther, chief of SRS' Livestock, Dairy, and Poultry Branch, and Duane Jewell, head of the Livestock Section, we'll show you how to use these two SRS reports to gauge market supplies in the coming 4 to 6 months.

Step One: Estimate Fed Cattle Marketings.

The bulk of the Nation's beef supply—about 75 percent—comes

from fed cattle produced in feedlots. Thus, the potential supply of fed cattle, more than any other single factor, is what determines cattle prices in the short run.

Each issue of the quarterly *Cattle on Feed* report includes a forecast of fed cattle marketings in the coming 3 months.

But many producers want to take a longer look at the market when making production and marketing decisions—and for this type of forecasting they need to refer to the data in the report that show the number of cattle on feed in the various weight groups.

Steers in the light end of the 700-900 pound weight shown in the *Cattle on Feed* report, and all the steers and heifers in the under 700 pound category will provide the bulk of fed cattle marketings 4 to 6 months hence.

To illustrate how you can forecast October-December 1974 fed cattle marketings:

Assume the *Cattle on Feed* report to be published July 18 shows 3.0 million steers 700-900 pounds in feedlots as of July 1. Take half of this number (presumably about half would be on the light end of the weight group) and add it to the total number of steers and heifers in the 700 pound and under class. Let's suppose the latter figure is 3.5 million head. Your combined total would be 5.0 million head.

This combined total next needs to be plotted on the chart on page 5 which depicts the historical relationships that have existed between the number of cattle on feed July 1 and fed cattle marketings in October-December.

The plotting is a simple matter of pinpointing your combined total of 5.0 million head on the horizontal line which indicates the number of July 1 cattle on feed in the appropriate weight groups. From that point you would draw a straight line up to the diagonal and read off

the forecasted level of October-December marketings. You should get about 6.5 million head.

Step Two: Correct for Current Conditions.

You can see that the chart on page 5 also includes numbers and dots above and below the diagonal line.

These dots indicate the years in the past decade when actual October-December marketings have deviated from the historical trend as shown by the diagonal line.

An explanation of what caused the marked deviation in 1973 from the historical norm will give you an idea of the host of factors that you need to consider in forecasting future marketings.

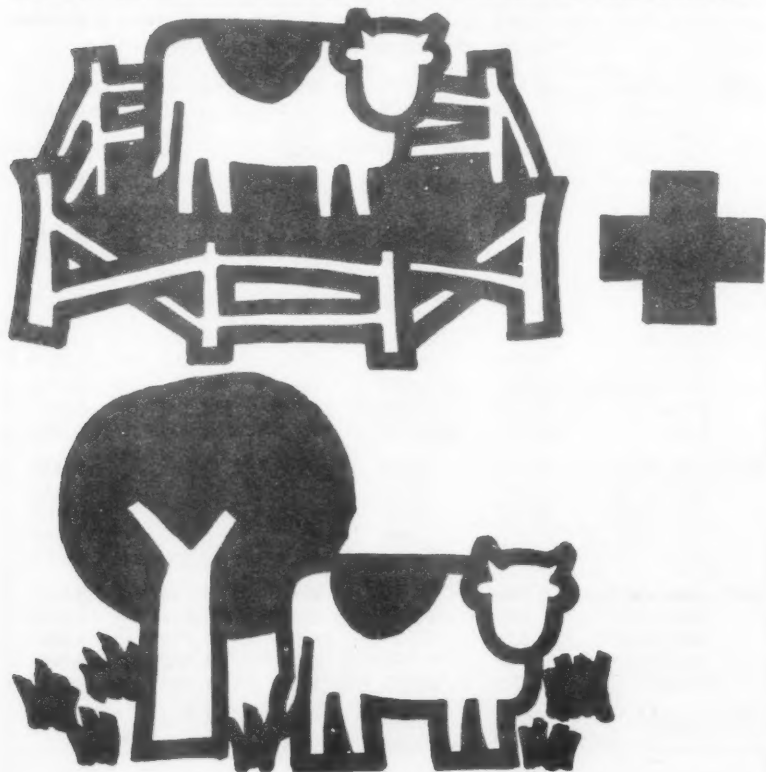
Last year, for instance, severe cold

and prolonged wet weather during the winter and spring, reduced use of protein feeds because of their high cost, and the prohibition against using DES as a growth booster resulted in slower than usual weight gains.

Consequently, it took cattle a good deal longer to reach market weights, disrupting the normal time relationships between birth and slaughter.

Then, on top of this delay, producer, packer, and consumer reactions to price freezes were an additional monkeywrench thrown into the marketing system.

Some cattlemen fed animals to heavier weights, further slowing the movement of animals through the production and marketing system.





SLAUGHTER TRENDS

Year and quarter	Steer and heifer slaughter			Cow and bull slaughter	Total commercial slaughter
	Fed	Total	Fed share of total		
	<i>Thousand head</i>		<i>Percent</i>	<i>Thousand head</i>	
1968 Jan.-Mar.	5,567	6,740	82.6	1,737	8,477
Apr.-Jun.	5,685	6,885	82.6	1,645	8,530
July-Sept.	5,786	7,144	81.0	1,968	9,112
Oct.-Dec.	5,624	6,870	81.9	2,037	8,907
Year	22,662	27,639	82.0	7,387	35,026
1969 Jan.-Mar.	5,949	6,877	86.5	1,798	8,675
Apr.-Jun.	5,863	6,709	87.4	1,750	8,459
July-Sept.	6,067	7,119	85.2	1,986	9,105
Oct.-Dec.	5,981	7,035	85.0	1,963	8,998
Year	23,860	27,740	86.0	7,497	35,237
1970 Jan.-Mar.	6,148	6,881	89.4	1,635	8,516
Apr.-Jun.	6,219	7,095	87.7	1,578	8,673
July-Sept.	6,302	7,248	87.0	1,701	8,949
Oct.-Dec.	6,215	7,112	87.4	1,775	8,887
Year	24,884	28,336	87.8	6,689	35,025
1971 Jan.-Mar.	6,231	6,954	89.6	1,633	8,587
Apr.-Jun.	6,278	7,166	87.6	1,751	8,917
July-Sept.	6,594	7,485	88.1	1,794	9,279
Oct.-Dec.	6,178	6,974	88.6	1,829	8,803
Year	25,281	28,579	88.5	7,007	35,586
1972 Jan.-Mar.	6,443	7,029	91.7	1,665	8,698
Apr.-Jun.	6,727	7,381	91.1	1,641	9,022
July-Sept.	6,907	7,351	94.0	1,650	9,015
Oct.-Dec.	6,775	7,363	92.0	1,679	9,044
Year	26,852	29,124	92.2	6,635	35,779
1973 Jan.-Mar.	6,585	6,904	95.4	1,744	8,648
Apr.-Jun.	6,283	6,541	96.1	1,591	8,132
July-Sept.	5,958	6,280	94.9	1,715	7,995
Oct.-Dec.	6,505	6,998	93.0	1,862	8,860
Year	25,331	26,723	94.8	6,912	33,635
1974 Jan.-Mar.	6,046	6,648	90.9	1,842	8,490

The result of all this was much lighter than usual slaughter during the normal marketing periods for last year's cattle.

So, whenever you make a forecast, you need to check on what's happening with the weather, feeding rates, ration composition, feeding costs, market weights, slaughter prices, and so on—and then use your best judgment as to what all these portend for future marketings.

Step Three: Estimate Total Steer and Heifer Slaughter.

Fed cattle marketings have gradually expanded from about 82 percent of total steer and heifer slaughter in 1968 to about 95 percent in 1973. (The table at the bottom of page 4 shows the percentages for each quarter during 1968-73 and the year long average.)

Once you have estimated fed cattle marketings, you can expand this into a total for all steers and heifers slaughtered.

To do this, divide the percentage fed cattle marketings represent of total steer and heifer slaughter into your estimate of fed cattle marketings.

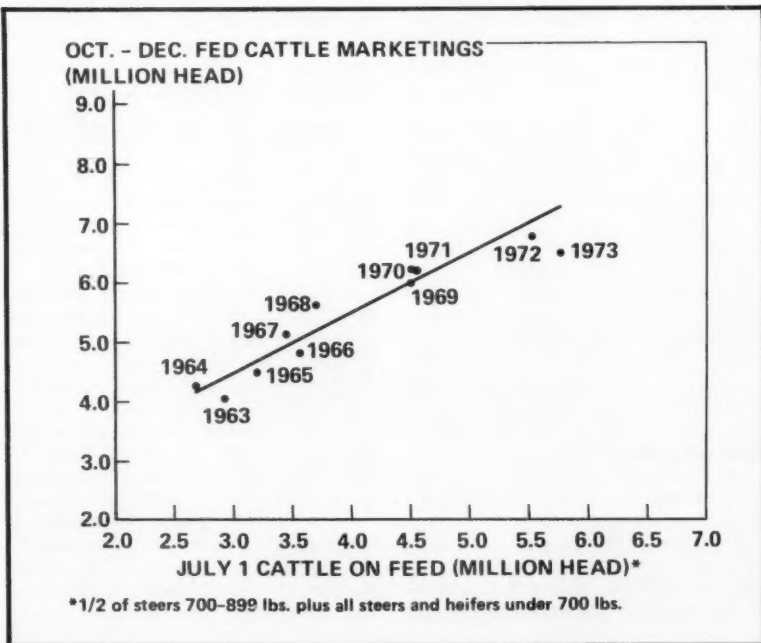
For example, if you use last October-December's percentage of 93, you would divide it into your fed cattle estimate of 6.5 million head this way:

$$6.5 \text{ million} \div .93 = 7.0 \text{ million}$$

Your total for all steer and heifer slaughter, consequently, is 7.0 million.

You will note for January-March 1974, fed cattle marketings represented 91 percent of total steer and heifer slaughter, the lowest for the quarter since 1971.

High feed and replacement costs and lower cattle prices have caused cattle feeders to place fewer animals on lots. As a result, some animals that would normally be marketed through feedlots are going direct to slaughter.



Step Four: Figure Cow and Bull Slaughter.

Again you need to refer to the table on page 4 to determine the range of October-December cow and bull slaughter over the past 5 years.

Basically it has fluctuated from about 1.7 million to 2.0 million head—but whether you'll make your estimate on the high or low side of this range depends in part on what you feel about the current phase of the cattle cycle.

Cattle production is characterized by ups and downs in production related to ups and downs in prices. Strong prices tend to encourage herd expansion, less favorable prices can make for herd reductions.

Consequently, the buildup phase of the cattle cycle typically sees a downturn in slaughter as cattlemen withhold cows for breeding purposes. This tends to strengthen prices and encourage even more expansion.

But at a certain point the inventory becomes large enough to precipitate rather sizable increases in slaughter and then prices may weaken.

As prices go down, cattlemen decide to stop holding extra animals for expansion and begin more heavy culling of breeding herds. This adds more animals to the slaughter market and can further depress prices.

Thus, when you estimate cow and bull slaughter, you may wish to opt for a higher figure if you feel the current cattle cycle is starting to peak.

Conversely, your estimate would be fairly low if you think prices are good enough to encourage herd expansion—which would mean lower cow slaughter.

Let's assume you estimate total cow and bull slaughter at 1.9 million head.

Step Five: Add'Em Up.

All that remains in coming up with a forecast of total October-December cattle slaughter is to sum

total steer and heifer slaughter with total cow and bull slaughter.

The hypothetical numbers we've been working with so far would put this grand total at 8.9 million head.

Why Bother?

Why should any farmer waste his time making elaborate marketing forecasts when he could be tending his livestock?

Because his future may depend on it, according to a number of agricultural experts.

Today's farming costs too much to afford the luxury of marketing neglect. In fact, some experts see marketing sophistication as the deciding factor in who will be farming 5, 10, 15 years from now.

(Readers may obtain full-size charts for all four quarters of the year to use in plotting prospective marketings by sending a postcard with their name, address, and zip-code to: Editor, Agricultural Situation, SRS-INF, U.S. Department of Agriculture, Washington, D.C. 20250.)

UPCOMING SRS CATTLE REPORTS

Cattle on feed, 23 States: Number on feed by classes, weight groups, marketings, and placements. Cattle sold for slaughter at selected markets. July 18 and October 18.

Cattle on feed, seven States: Number of feed, marketings, and placements. Cattle sold for slaughter at selected markets. July 18, Aug. 14, Sept. 13, Oct. 18, Nov. 13, and Dec. 13.

Cattle: Number and classes, major States and U. S. as of July 1. Expected number of calves born and to be born during 1974. July 26.

Livestock Slaughter: Number and live weight of cattle slaughtered in commercial plants by States. July 30, Aug. 29, Sept. 27, Oct. 30, Nov. 27, and Dec. 30.

AFTER STREAK WEAR



While birthday suits are the fashion for streaking, most men prefer donning cotton blend permanent press slacks and shirts for informal wear.

At least that was the general consensus from a nationwide survey of 2,001 men when asked about their opinions of various fibers used in selected clothing items.

The study by USDA opinion researchers was designed to help natural fiber producers and manufacturers market their products more effectively based on consumer preferences.

Although most respondents favored a blend of synthetic and cotton fibers for dress shirts, lightweight sport shirts and slacks, their interest centered on ease of care resulting from the permanent press finish rather than any particular fiber.

Positive features of permanent press included: wrinkle resistance, shape retention and minimal ironing requirements.

But underneath it all, comfort became the major issue rather than ease of care. Men liked 100 percent cotton undershorts better without a

permanent press finish.

Although style was the most significant feature in undershorts, fiber received the second largest number of mentions.

When discussing fiber content, about half or more respondents ranked all cotton ahead of all synthetic, all rayon or acetate and all wool for the following features: feels comfortable, can be worn year-round, good values, attractive colors and styles, and durability.

Among other features mentioned were: does not cling, absorbs moisture, and is washable.

On the other hand, all synthetic was highly rated for its wrinkle resistance but received low marks for comfort on skin and moisture absorption.

Wool's image was generally less popular than cotton's, too.

However, wool pulled ahead of synthetic materials because of durability and moisture absorption features.

Regardless of the selected clothing item, brand name was mentioned most by the respondents as the least important feature governing purchases of clothing.

FLOWER POWER

California captures the winner's bouquet by a stem's length while Florida "petals" hard to place and Colorado shows by a nosegay in the 1973 Garden Variety Derby.

The results of the race—published in SRS's latest survey of flower and foliage plants—reveal California ranks first with \$73 million in sales, followed by Florida, a distant second with \$28 million, and Colorado, a close third with \$20 million based on wholesale value of cut carnations, gladioli, roses, and both cut and potted chrysanthemums.

Florida outdistanced the others, though, in foliage plant sales—chalking up \$33 million, followed by California with \$13 million.

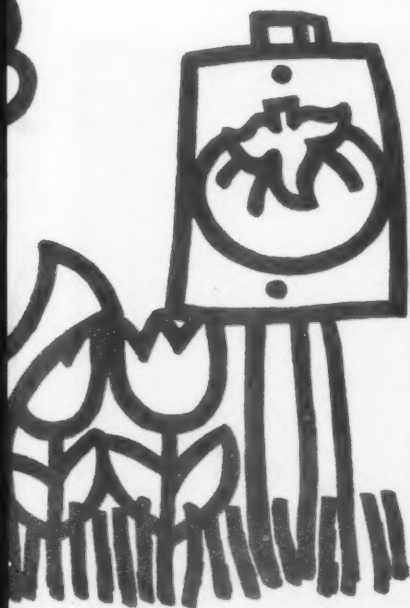
California galloped ahead as the leading producer of carnations, standard chrysanthemums, potted chrysanthemums, and roses while Florida was the largest producer of pompon chrysanthemums, gladioli, and foliage plants.

Wholesale value of these four important flower and foliage plants in the 23 major producing states was \$294 million in 1973, 9 percent above the previous year.

Sales of cut carnations, gladioli, roses, chrysanthemums, and potted chrysanthemums grown in 23 States in 1973 had a wholesale value



Horticultural services \$545 million
Cut flowers \$429 million
Nursery products \$280 million
Sod \$48 million
Seeds \$46 million
Bulbs \$11 million



of \$228 million, while sales of foliage plants totaled \$66 million.

Of the 3,810 growers surveyed, 56 reported sales under \$50,000. Nineteen percent were in the \$50,000-99,999 sales group; 16 percent sold \$100,000-249,999; 5 percent in the \$250,000-499,999 group; and 4 percent had \$500,000-plus in sales.

Strategy for the 1974 race: Growers plan to reduce production of potted and pompon chrysanthemums and gladioli; increase production of carnations and foliage plants; and keep output of standard chrysanthemums and roses near 1973 figures.

THE GREAT GREEN THUMB

Growing ornamental plants and flowers—and taking care of them—is a billion dollar U.S. industry. At the time of the last agricultural census, sales of ornamentals—cut flowers and plants, nursery stock, sod, and seeds—were worth \$813 million, up nearly 60 percent from the decade before. And horticultural services—landscape planning and counseling, lawn and garden services, and shrub and tree services—surveyed for the first time in 1969, added another half billion dollars to the value of the Nation's great green thumb.

SURVEYSCOPE

To give our readers a clearer picture of the vast scope of SRS activities, Agricultural Situation presents a series of articles on special surveys undertaken in various States. While these are not national surveys, they are important to the agriculture in individual States.

Though the cranberry industry's historical roots lie along the New England Coast, the State of Wisconsin has become the Nation's second largest producer—and could in time become No. 1 since the industry is growing faster there than anywhere else.

The tart red berry is Wisconsin's leading fruit crop, valued at \$10.7 million in 1973. Because of the berry's economic importance, the Wisconsin SRS office conducts a special State survey of yields in addition to the mail survey of growers carried on as part of

the national estimating program for cranberries.

"Wisconsin's cranberry producers, like those elsewhere, have shown increasing interest in the mid-August forecast of cranberry production released each year by the Crop Reporting Board in Washington," relates "Scotty" Walters, statistician in charge of the SRS office in Madison.

"The August forecast is an important guide to probable requirements for labor, transportation, containers, storage facilities, and nationwide promotional campaigns."



Special bog surveys that permit scientific measurement of yields are a part of . . .

"Furthermore, this first forecast of the season has a significant influence on marketing order decisions as well as pricing of early fresh market shipments."

Historically, the national cranberry estimates have been based on the combined judgment of many individual growers of current crop prospects.

However, Walters notes that a cranberry crop's visual appearance—density of vines, set of berries, size of berries, and so on—can be deceiving to any observer making a subjective evaluation of prospective yield. And an incorrect appraisal of yields can throw off the early season production forecast.

"Because Wisconsin growers need the most reliable early season statistics possible for making production decisions, we started in 1968 to supplement the grower survey with a special bog survey that permits a scientific objective measurement of

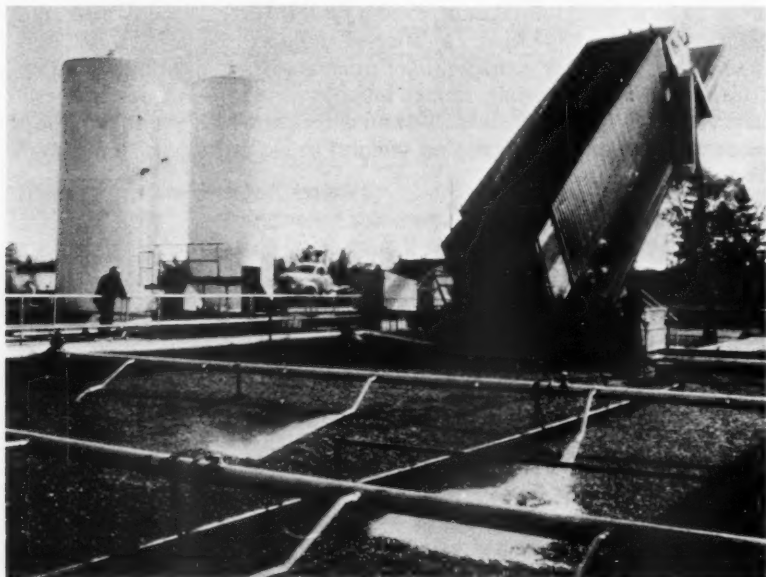
yields," Walters states.

"What we do each year is to collect a representative sample of berries from frames, 12½ inches square, approximately 1 / 40,000 of an acre, with three randomly selected samples taken in two beds per marsh on 50 marshes," Walters explains.

"As cranberries grow, not in rows or in bushes, but in a relatively uniform distribution throughout a mat of vines over the bog surface, the average weight of berries per frame can be expanded to an acre equivalent weight."

"Over a period of years, a relationship of the sample weight in mid-August, when the initial seasonal forecast is made, to the final State average yield can be determined."

"And once we know the relationship, we can make a pretty good early season forecast of final production—which is a big help to Wisconsin's cranberry producers," Walters concludes.



... the cranberry estimating program in Wisconsin, the Nation's No. 2 cranberry State.

Briefings

RECENT REPORTS BY USDA OF ECONOMIC, MARKETING, AND RESEARCH DEVELOPMENTS AFFECTING FARMERS.

MORE CIGARETTES . . . In 1973 U. S. smokers puffed a record 591 billion cigarettes—4.6% more than the previous year. Use per adult rose 3% to 4,155 cigarettes (208 packs). Per capita use may increase again in 1974. So with an increasing smoking-age population, this year's total cigarette use may top last year's record.

THE TOBACCO TOTAL . . . Filter-tip cigarettes represented 85.4% of total cigarette production in 1973, up from 83.7% the year before, according to the annual survey of cigarette manufacturers made by USDA economists. The increase occurred throughout the filter-tip category. The 100 millimeter size, a big gainer in previous years, leveled off at 22% of 1973 total output. Except for the 100 millimeter size, filter cigarettes generally have a shorter tobacco column than non-filters—and in recent years some of them also have a slimmer column. These factors substantially reduce tobacco requirements per cigarette. Last year U.S. manufacturers used an estimated 1.23 billion pounds of tobacco (unstemmed processing weight) in cigarettes, up about 4½% from the previous year.

TOBACCO SUBSTITUTE . . . A U.S. firm has announced expansion plans which will locate a plant in the United States to commercially produce a new tobacco substitute made of a chemical fiber. The plant, with an initial capacity of 9 million tons annually, is expected to be completed and in operation by 1975. It will initially supply a tobacco substitute for further development by two U.K. cigarette firms. Commercial production of cigarettes with the tobacco substitute is not seen prior to 1976.

CHINA TRADE PROSPECTS . . . Because of bumper 1973 crops and if reasonably good weather prevails through 1974, agricultural imports in 1974/75 by the People's Republic of China could decline from the record levels of fiscal 1973 and 1974, and farm imports from the United States could be cut back somewhat from the \$1,218 million fore-

seen for fiscal 1974. Since U.S.-Chinese trade resumed in fall 1972 after a 20-year lapse, the U.S. has been a major supplier of farm products to the Mainland. During the past year, however, China has signed 3-year purchase contracts for grains, primarily wheat, with Canada, Australia, and Argentina. It is possible that the United States may become one of many suppliers for China in normal times but an important source of farm imports in difficult years.

U.S.-CHINESE AGRICULTURAL CONTRASTS . . . Grain output in the United States and the People's Republic of China is about the same, but China emphasizes grain for human consumption rather than for use as a livestock feed. In China, 55% of total grain area is planted to food grains, while in the U.S. 65% is in feed grains. Diets differ accordingly. Starches account for almost 80% of the average daily caloric intake in China but for only 23% here. U.S. crop yields are generally twice as high as yields in China—the difference between a technological agriculture and a labor-intensive system. China, with half as many cattle, uses them primarily as draft animals instead of meat. But China has nearly three times more hogs and sheep than the U.S., despite the low levels of feed grain production.

WHAT'S WITH WOOL . . . U.S. raw wool supplies are very limited in 1974 and prices are expected to remain near the Wool Act Incentive of 72 cents a pound. Continued relatively tight supplies and high prices are also expected for manmade fibers, despite a slowing in mill activity.

PRODUCTION PARTICULARS . . . There were 7% fewer stock sheep on farms and ranches at the start of 1974, meaning less wool will be shorn this year than last. Production in 1973, at 146 million pounds, grease basis, was down moderately from the year before as fewer sheep were shorn and average fleece weights declined.

REVIEWING 1973 . . . Last year's wool markets were affected by a host of different conditions: the energy shortage and its effect on industry activity and costs, a realignment of world monetary exchange rates, transportation problems, and a resurgence of consumer demand for textiles, especially natural fibers. With demand usually running ahead of available supplies, raw wool prices reached their highest levels in 20 years. In the United States the average producer price for shorn wool was 82.7 cents a pound, grease basis, compared with 35.0 cents a year earlier.

CROPLAND COUNT . . . Rapid urbanization has had little impact on the total amount of U.S. cropland, according to USDA economists, even though more than 3.5 million cropland acres were lost to urban areas in the last 10 years. For every acre so taken, five or six times as much crop area was shifted to lower intensity agricultural or forestry uses, or was idled simply because cropping was not profitable. Irrigation, drainage, and clearing added three times as much land annually to the cropland base as urbanization absorbed.

WHERE THE SHIFTS ARE . . . Cropland has been abandoned or shifted to grass or woods on a large scale in the Northeast, Appalachia, and parts of the Southeast. Thus, cities there do not compete as directly with agriculture, and have had little effect on total agricultural activity. Development of new cropland in Florida, the Lower Mississippi, and the Corn Belt, Mountain, and Pacific regions has tended to obscure losses of land to cities. However, USDA economists feel urbanization probably has had a sizable impact on these regions' farm production.

PROCESSED VEGETABLE VIGNETTE . . . This year promises at least partial relief from the tight supply situation that has marked the vegetable industry for the past 2 years. The prospective planted acreage of eight leading processing vegetables is 7% larger than a year ago and 14% more than in 1972. These vegetables account for more than 90% of the U.S. processing vegetable tonnage.

THE SUPPLY SCENE . . . Cannery and freezers should generally be able to contract for sufficient acreage to relieve much of the pressure on supplies of processed vegetables. Furthermore, the industry has apparently been able to secure the largest gains where the tonnage is needed. For example, canned snap bean and sweet corn acreage are being emphasized more this year, while freezing acreage is expected to be less.

PRICE PICTURE . . . Although supplies may be substantially larger beginning this fall, higher wholesale and retail prices are expected. The cost of obtaining the added acreage has come high in 1974. Contract prices to growers, sharply higher in all cases, must reflect higher fuel, seed, and other production costs. Furthermore, farmers in the major vegetable processing areas have been offered several attractive crop alternatives this season. For example, in California cotton has proved attractive to San Joaquin Valley growers while in the Pacific Northwest record high wheat and dry bean prices have driven up the cost of securing cropland for processing vegetables.

Statistical Barometer

Item	1972	1973	1974—latest available data	
Prices:				
All prices received by farmers (1967=100)	126	172	183	April
Crops (1967=100)	115	164	205	April
Food grains (1967=100)	109	212	275	April
Feed grains and hay (1967=100)	105	162	202	April
Feed grains (1967=100)	101	161	203	April
Cotton (1967=100)	127	149	259	April
Tobacco (1967=100)	123	129	138	April
Oil crops (1967=100)	116	209	195	April
Fruit (1967=100)	115	131	137	April
Fresh market ¹ (1967=100)	122	138	136	April
Commercial vegetables (1967=100)	116	137	131	April
Fresh market (1967=100)	131	162	148	April
Potatoes, sweetpotatoes, and dry edible beans (1967=100)	121	208	410	April
Livestock and products (1967=100)	134	178	169	April
Meat animals (1967=100)	147	198	172	April
Dairy products (1967=100)	120	138	170	April
Poultry and eggs (1967=100)	103	175	155	April
Wool (1967=100)	90	204	176	April
Prices paid, interest, taxes, and farm wage rates (1967=100)	127	145	164	April
Prices paid by farmers	123	142	162	April
Family maintenance	124	138	157	April
Farm production	122	146	167	April
Ratio ² (1967=100)	118	118	112	April
Consumer price index, all items (1967=100)	125	131	143	March
Food (1967=100)	141	153	159	March
Farm Income:				
Volume of farm marketings (1967=100)	112	110	101	March
Cash receipts from farm marketings (\$bil.)	60.7	83.4	104.0	⁴
Realized gross farm income (\$bil.)	68.9	90.5	108.2	⁴
Production expenses (\$bil.)	49.2	64.4	80.0	⁴
Realized net farm income (\$bil.)	19.7	26.1	28.2	⁴
Income and Spending:				
Disposable personal income, total (\$bil.)	797.0	882.5	930.5	⁴
Expenditures for food (\$bil.)	125.0	138.8	149.8	⁴
Share of income spent for food (percent)	15.7	15.7	16.1	⁴
Farm Food Market Basket:³				
Retail cost (1967=100)	121	142	162	March
Farm value (1967=100)	124	164	182	March
Farmer's share of retail cost (percent)	40	45	44	March
Agricultural Trade:				
Agricultural exports (\$bil.)	9.4	17.7	5.8	Jan.-Mar.
Agricultural imports (\$bil.)	6.5	8.4	2.6	Jan.-Mar.

¹Fresh market for noncitrus and fresh market and processing for citrus.

²Ratio of index of prices received by farmers to index of prices paid, interest, taxes, and farm wage rates.

³Average quantities per family and single person households bought by wage and clerical workers, 1960-61, based on Bureau of Labor Statistics figures.

⁴Annual rate, seasonally adjusted, first quarter.

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